Scorebook Navigator™

Stage 2 Consensus User Manual

Version 10.4.2010
(revised 9/7/2011 bjl and 5/9/2012 TNCPE)

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Table of Contents

The Consensus Scorebook Screen 3

Consensus Item Assignments 4

Synthesis 5

Synthesizing Key Factors 6

Developing Strengths and OFIs 6

Using Observation Fields 7

E-mail Capabilities 8

Printing Stage 1 pre-work 8

Scoring 9

Using *Scorebook Navigator*™ at Consensus 9

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Stage 2 – Consensus

After stage 1- independent review, examiner teams move on to stage 2-consensus. During this phase, team members consolidate their independent review findings, eventually coming to an agreement on scorebook comments, key factors, site visit issues and numerical scores.

Scorebook Navigator™ provides a number of features that support the consensus process. These include:

1. A shared consensus scorebook that is accessible in read-only format to all team members,
2. Access to each team member's Stage 1 work that makes it easy for item leaders to consolidate feedback-ready comments,
3. **Observation** Fields, which can be used by item back-ups to provide feedback to the item leader or team leader,
4. An integrated e-mail function that facilitates off-line discussion of issues, and
5. The ability to revise the consensus scorebook in "real-time" during the consensus meeting.

The Consensus Scorebook Screen

After your team has completed independent review, the team leader will assign each member an item or items to synthesize prior to the consensus meeting. When you log into *Scorebook Navigator*™, the **Scorebook** Screen will display this new assignment under a tab called **Stage :: 2**.

You still have access to a copy of your Independent Review Scorebook under the **Stage :: 1** Tab. The link to this scorebook is grey, indicating that it is a read-only file. Use this scorebook as a reference as you synthesize your assigned items for consensus.

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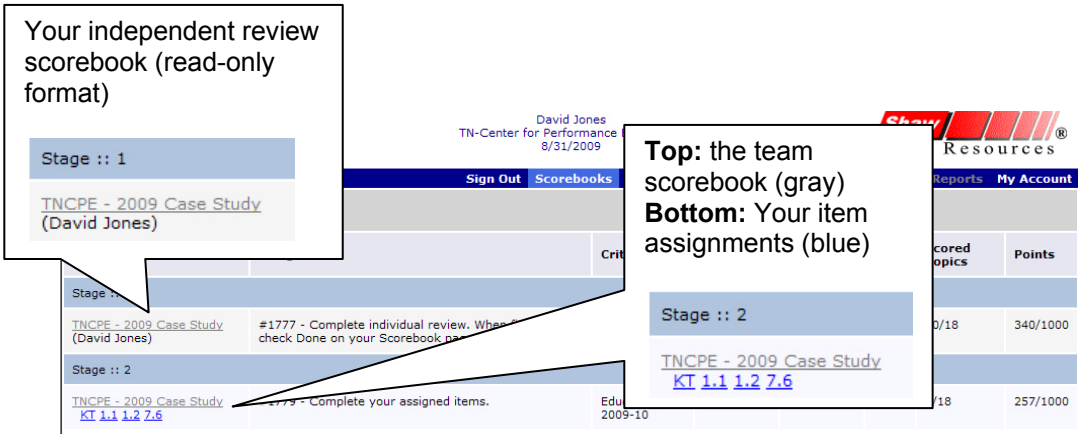

FIGURE 1 - Your independent review scorebook in read-only format appears in the Scorebook column under the Stage :: 1 Tab. In the same column, the Stage :: 2 Tab contains a link to the shared team scorebook (in grey) and your assigned items (in blue).

On the **Stage:: 2** Tab, under the Scorebook column heading, you will find your assigned items (blue links) and the shared consensus scorebook.

The shared consensus scorebook link is gray, indicating it's in read-only format. Every team member can view this scorebook at any time. The scorebook is filled as members complete their item assignments.

Consensus Item Assignments

When you click on a blue item assignment link to begin your item synthesis, it will open a scorebook screen that looks a lot like the Item Evaluation scorebook screen you used in independent review. Some of the tabs are different, however.

As in independent review, there are **Key Factors References** and **Scoring** Tabs, but a **Strengths** Tab and an **OFIs** Tab replace the **Evaluation Factors**, **Gaps** and **Overall Item Notes** Tabs.

The other major difference is that you now have access to fellow examiners' independent review findings, accessible by clicking the gold **Circle 1** Icon.

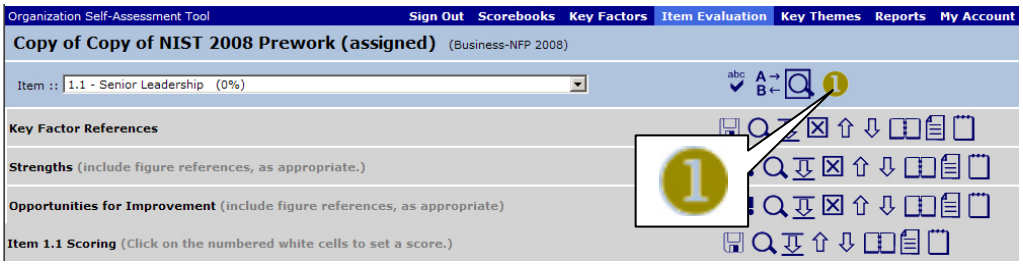

FIGURE 2 - Click the gold Circle 1 icon to view fellow team members' work as you synthesize items.

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Once clicked, the gold **Circle 1** Icon turns blue and the team's relevant independent review work will appear on a gold panel above each scorebook tab (team key factor references above the scorebook **Key Factor References** Tab, team item evaluation findings above the **Strengths** and **OFIs** Tabs). The gold panel has its own scrollbar.

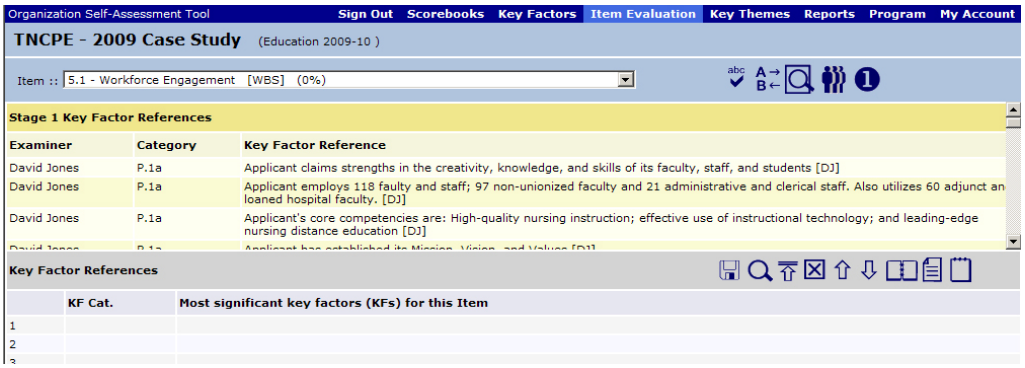
Organization Self-Assessment Tool
Sign Out
Scorebooks
Key Factors
Item Evaluation
Key Themes
Reports
Program
My Account
TNCPE - 2009 Case Study (Education 2009-10)
Item :: 5.1 - Workforce Engagement [WBS] (0%)
Stage 1 Key Factor References
Examiner
Category
Key Factor Reference
David Jones
P.1a
Applicant claims strengths in the creativity, knowledge, and skills of its faculty, staff, and students [DJ]
David Jones
P.1a
Applicant employs 118 faulty and staff; 97 non-unionized faculty and 21 administrative and clerical staff. Also utilizes 60 adjunct an loaned hospital faculty. [DJ]
David Jones
P.1a
Applicant's core competencies are: High-quality nursing instruction; effective use of instructional technology; and leading-edge nursing distance education [DJ]
Key Factor References
KF Cat.
Most significant key factors (KFs) for this Item
1
2

FIGURE 3 - When you click the gold Circle 1 Icon, a panel appears that contains your team's independent review findings.

Click the blue **Circle 1** icon to hide the team's independent review observations, increasing your workspace.

Sortability
A handy feature: the columns in the gold panels are sortable by clicking on the header. For example, an item lead might sort by item reference. This will group the examiners' observations by Criteria area, making it easier to note similar observations.

Synthesis

Prior to synthesis, the key factors are typically consolidated again, incorporating any new key factors that developed during independent review. These newly consolidated key factors will appear when you select the **Key Factors** Tab on the menu bar, or when you choose the Key Factor References panel from the drop-down menu on the **Item Evaluation** Screen. Note that the key factors on the Item Evaluation drop-down menu may be abbreviated. To view the full text of the consolidated key factors, go to the **Key Factors** Tab, or print a Key Factors Report.

OFI Alert
On the **Key Factors** Screen in the consensus scorebook, it is possible for team members to alter the key factors. PLEASE DON'T unless you're at the Consensus meeting. If you would like to change a key factor during synthesis, make a note in the **Observation** Field on the **Key Factors** Screen. Any changes to key factors at this point in the evaluation must be a team decision.

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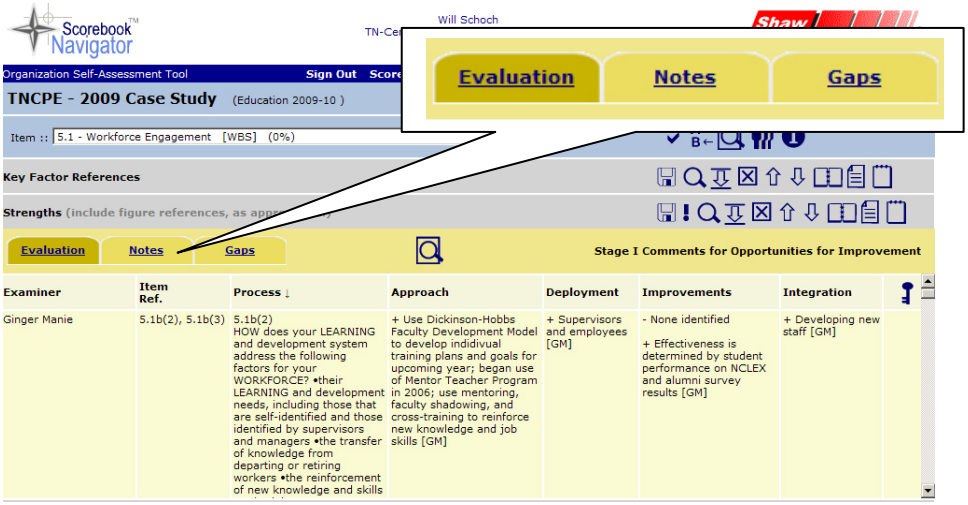
Synthesizing Key Factors

Working with the Key Factors panel in the Consensus Item Evaluation Screen, item leaders have 12 spaces to select the most significant key factors relative to an item. Remember, you will select no more than six key factors per item, but the extra spaces allow a little more room to work. Use the navigation arrows on the tool bar to move key factors up or down, as their relevance is determined through supporting comments. When you're done, remove surplus key factors from the bottom of the list.

Developing Strengths and OFIs

You will use the fields in the Strengths and Opportunities for Improvements panels to develop the comments you will present at your consensus meeting.

When you access the Strengths and OFIs panels, fellow team members' work will appear when you click the gold **Circle 1** Icon. Team observations will be organized into three tabs: **Evaluation**, **Notes**, and **Gaps**. These tabs correspond to the fields examiners filled in on the independent review scorebook.


Scorebook Navigator
Will Schoch
Evaluation
Notes
Gaps
Organization Self-Assessment Tool
Sign Out
TNCPE - 2009 Case Study
(Education 2009-10)
Item :: 5.1 - Workforce Engagement [WBS] (0%)
Key Factor References
Strengths (include figure references, as appr
Evaluation
Notes
Gaps
Stage I Comments for Opportunities for Improvement
Examiner
Item Ref.
Process
Approach
Deployment
Improvements
Integration
Ginger Manie
5.1b(2), 5.1b(3)
5.1b(2) HOW does your LEARNING and development system address the following factors for your WORKFORCE? •their LEARNING and development needs, including those that are self-identified and those identified by supervisors and managers •the transfer of knowledge from departing or retiring workers •the reinforcement of new knowledge and skills
+ Use Dickinson-Hobbs Faculty Development Model to develop indidivual training plans and goals for upcoming year; began use of Mentor Teacher Program in 2006; use mentoring, faculty shadowing, and cross-training to reinforce new knowledge and job skills [GM]
+ Supervisors and employees [GM]
- None identified
+ Effectiveness is determined by student performance on NCLEX and alumni survey results [GM]
+ Developing new staff [GM]

To cut back on typing, you can move team members' observations from the gold panels into the **Strengths** and **OFIs** Tabs as you construct comments. This can be done in one of two ways:

1. Copy and paste the relevant text. (Highlight with your mouse, then Ctrl-C to copy, Ctrl-V to paste on a PC; Command-C to copy, Command-V to paste on a Mac.).

2. Click to open the field in the scorebook where you want to place an observation. Go into the gold panel and highlight the observation with your mouse. Drag and drop the highlighted text into the open field.

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Retain Initials for Consensus
Please be sure to retain the initials of the examiner(s) whose independent review work has been incorporated into the comments you develop. You will need these references for the consensus meeting.

Using Observation Fields

In the consensus scorebook, you will encounter **Observation** fields on the **Key Factors** screen, as well as on the **Strength** and **OFI** Tabs on the **Item Evaluation** screen.

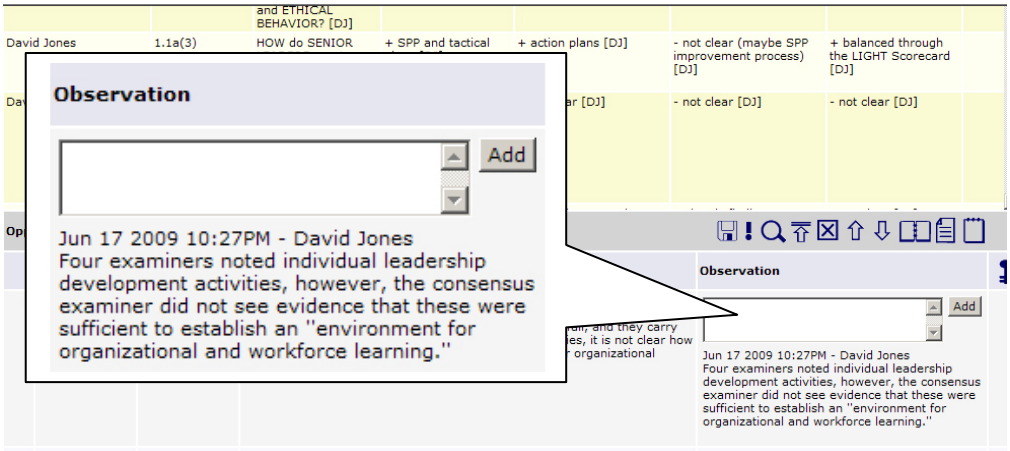
and ETHICAL BEHAVIOR? [DJ]
David Jones
1.1a(3)
HOW do SENIOR
+ SPP and tactical
+ action plans [DJ]
- not clear (maybe SPP improvement process) [DJ]
+ balanced through the LIGHT Scorecard [DJ]
- not clear [DJ]
- not clear [DJ]
Observation
Add
Jun 17 2009 10:27PM - David Jones
Four examiners noted individual leadership development activities, however, the consensus examiner did not see evidence that these were sufficient to establish an "environment for organizational and workforce learning."
Observation
Add
Jun 17 2009 10:27PM - David Jones
Four examiners noted individual leadership development activities, however, the consensus examiner did not see evidence that these were sufficient to establish an "environment for organizational and workforce learning."

FIGURE 4 - Use the Observation Fields in the consensus scorebook to communicate with fellow examiners during synthesis, and to remember your rationale for the consensus meeting.

The **Observation** fields provide a communication tool for the team. An item leader can note why a comment was not used, suggest re-wording of a key factor, or briefly explain his/her rationale behind the comment. This is also a space where the item back-up can provide feedback.

As multiple examiners contribute thoughts, the most recent observation will be at the top. The software automatically notates the observation with the date, time and examiner name.

OFI Alert: Observations Won't Print
Something to keep in mind: The observation fields are viewable by all members of the team as they use the software. However, data in these fields will not appear on the Item Report printouts. To ensure that your observations and comment rationale are visible during consensus (if you will be using printed Item Reports), place your notes below the completed comments in the Comments fields.

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E-mail Capabilities

If an item leader wants immediate feedback on an observation, he or she can e-mail the team leader, item back-up or the whole team using *Scorebook Navigator*™

The **People** icon (left) on the toolbar will activate the examiners' e-mail system, which contains the contact information for team members.

If you select the "E-Mail Whole Team" option, be sure to check your e-mail system protocol. *Scorebook Navigator*™ separates e-mail addresses by semi-colons. If your mass e-mail function is comma-delimited or another protocol, you will have to do some editing. It may be easiest to just cut and paste the desired e-mail addresses into your e-mail system.

Printing Stage 1 pre-work

An item leader may wish to print all of the team's independent review observations as a resource for synthesizing observations into comments. Here's how to do it:

1. In the consensus scorebook, select the **Item Evaluation** Tab. Choose the item you want to print from the drop-down menu at the top of the screen.

2. Click the gold **Circle 1** Icon. This will display all team members' work for that item.

3. Page down past the **Key Factors** Tab to the **Strengths** Tab.

4. Under the **Strengths** Tab, on the gold panel, click the **Print Preview** Icon (left). This will open up a window with a printer-friendly version of the item observations. From this window you can sort the data by clicking on the column headers.

5. If you would like a Word copy of this report, right click in the report, click Select All, then copy and paste into Word.

6. For a printout without copying in Word, in your browser, set up your printer preferences and print. Please be aware that you will be printing your entire team's independent review observations for that item, which could result in a large print job. Consider using the print preview window to identify selected pages or page ranges.

7. Also note that the team observations in the gold panels above the **Strengths** Tab are the same observations that appear above the **OFIs** Tab. You don't need to print them twice

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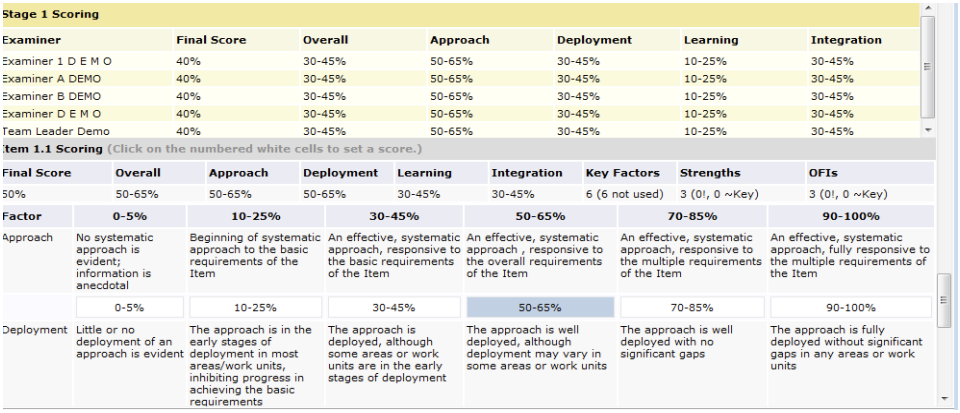
Scoring

When the gold Circle 1 button is activated, item leaders have access to all the scores selected by team members. This information is provided for reference only, as scoring information should never be averaged during an evaluation.



Stage 1 Scoring

Examiner	Final Score	Overall	Approach	Deployment	Learning	Integration
Examiner 1 D E M O	40%	30-45%	50-65%	30-45%	10-25%	30-45%
Examiner A DEMO	40%	30-45%	50-65%	30-45%	10-25%	30-45%
Examiner B DEMO	40%	30-45%	50-65%	30-45%	10-25%	30-45%
Examiner D E M O	40%	30-45%	50-65%	30-45%	10-25%	30-45%
Team Leader Demo	40%	30-45%	50-65%	30-45%	10-25%	30-45%

Item 1.1 Scoring (Click on the numbered white cells to set a score.)

Final Score	Overall	Approach	Deployment	Learning	Integration	Key Factors	Strengths	OFIs
50%	50-65%	50-65%	50-65%	30-45%	30-45%	6 (6 not used)	3 (0!, 0 ~Key)	3 (0!, 0 ~Key)

Factor	0-5%	10-25%	30-45%	50-65%	70-85%	90-100%
Approach	No systematic approach is evident; information is anecdotal	Beginning of systematic approach to the basic requirements of the Item	An effective, systematic approach, responsive to the basic requirements of the Item	An effective, systematic approach , responsive to the overall requirements of the Item	An effective, systematic approach, responsive to the multiple requirements of the Item	An effective, systematic approach, fully responsive to the multiple requirements of the Item
	0-5%	10-25%	30-45%	50-65%	70-85%	90-100%
Deployment	Little or no deployment of an approach is evident	The approach is in the early stages of deployment in most areas/work units, inhibiting progress in achieving the basic requirements	The approach is deployed, although some areas or work units are in the early stages of deployment	The approach is well deployed, although deployment may vary in some areas or work units	The approach is well deployed with no significant gaps	The approach is fully deployed without significant gaps in any areas or work units

FIGURE 5 - Item leaders have access to the team's item scores. This is for reference only -- never average scores!

Remember that when you score an item in the shared consensus scorebook you are scoring your comments, which are derived from the work of others. It is likely that consensus scoring will vary from the scoring done in independent review, as the item leaders have more information to consider when determining the scoring range and the score.

Using *Scorebook Navigator™* at Consensus

Since the shared Stage 2 Consensus Scorebook is a single document that can be accessed by multiple users at one time, it will support real time revision during the consensus meeting. This can be a powerful aid in the consensus process. Here is how it works:

1. Prior to a consensus meeting, the team members can review the comments written by all other team members and enter any feedback they have in the observation box. Item leads can make changes to the comments, if appropriate, in response to other team members' feedback. This "virtual" consensus can significantly reduce the time needed in a face-to-face consensus meeting.

2. During the consensus meeting, item leaders direct the discussion pertaining to their items. As this takes place, the item leaders can make and save agreed-upon changes to their sections of the scorebook (accessible to them via the blue assignment link on the Scorebooks page).

3. Once the changes are entered, team members should "refresh" their browsers, updating their team consensus scorebook screens with the revised information.

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When the team concludes the consensus meeting, examiner initials are removed from all comments in the shared consensus scorebook and other edits are made to meet the Feedback Report guidelines.

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